

Task Order 113 – CM Data Mart Operations

CM Data Mart Operations Monthly SLA Metrics Report Deliverable 113.1.1e

Period Ending: 2/28/03



**F E D E R A L
S T U D E N T A I D**

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Introduction

This is the February monthly report for Task Order 113 - CM Data Mart Operations. The purpose of this task order is to provide the capability to sustain the CM Data Mart. The report information will be provided separately for each system.

CM Data Mart Availability for Production

****Note:** Downtime for backups and scheduled outages are not shown

Date	Availability (%)	Notes
Sat - February 1	100%	
Sun - February 2	100%	
Mon - February 3	100%	
Tues - February 4	100%	
Wed - February 5	100%	
Thurs - February 6	100%	
Fri - February 7	100%	
Sat - February 8	100%	
Sun - February 9	100%	
Mon - February 10	100%	
Tues - February 11	99%	2/10, Researching problems with files not being sent thru EAI bus
Wed - February 12	100%	
Thurs - February 13	100%	
Fri - February 14	100%	
Sat - February 15	100%	
Sun - February 16	100%	
Mon - February 17	100%	
Tues - February 18	100%	
Wed - February 19	100%	
Thurs - February 20	100%	
Fri - February 21	99%	2/21, 03:20 - 04:26pm, MicroStrategy went down due to SFANT004 was rebooted per a request by the application group to re-establish communication with SFANT002 & 003. AHD # 4025115
Sat - February 22	100%	
Sun - February 23	100%	
Mon - February 24	100%	
Tues - February 25	100%	
Wed - February 26	100%	



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Date	Availability (%)	Notes
Thurs - February 27	100%	
Fri - February 28	100%	

CM Data Mart Operations Status

Work Accomplished During This Period

- Completed reconciliation aggregation for December for IF010s, IF020s, Greys, and Manual Transactions in the Production Environment.
- Began aggregations for December data.
- Completed load and reconciliation of Demographic data for January in Production environment.
- Completed catch-up for February, and March in the test environment.
- Added new transaction Ids to d_txn_map table.
- Assisted EAI team with establishing EAI bus to transfer data between FMS and CMDM.
- Provided daily monitoring of CM data mart availability.
- Continued tracking SIRs and enhancement requests.
- Continued to update user login information (add, remove, and reset IDs).
- Completed Data Mart Migrations for CM.
- Held bi-weekly CM Meetings with Power Users.
- Assisted Power Users with MicroStrategy report creation.
- Developed and amended mappings in Informatica to provide data to MicroStrategy reports.

Issues or Anticipated/Current Problems

- None

Planned Work for Next Period

- Continue MicroStrategy reporting enhancements and completion of outstanding SIRs.
- Continue to provide daily monitoring of CM Data Mart.
- Continue to update user login information (add, remove, and reset IDs).
- Continue issue resolution for open CM requests.
- Complete reconciliation and loading for January Data.
- Complete LTD0 aggregations for January.
- Load data for February for IF010, IF020, G-Records, and Manual Transactions.
- Load monthly Demographic data for February in production environment.
- Run full aggregation in Production for January and February data (aggregations with Demographic data).
- Continue catch-up process for Aggregate tables in Test Environment, and will then migrate data to Production Environment.



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- Continue transition for upgrade to MicroStrategy 7i.

Help Desk Monthly Throughput (CM)

Data Request (1 Time)

Category	ASAP	High	Medium	Low	Total
Carry Forward	1	0	0	0	1
New	0	0	0	0	0
Closed	0	0	0	0	0
End of Month Balance	1	0	0	0	1

Data Request (Multiple)

Category	ASAP	High	Medium	Low	Total
Carry Forward	0	0	2	0	2
New	0	0	0	0	0
Closed	0	0	0	0	0
End of Month Balance	0	0	2	0	2

Help Desk Request

Category	ASAP	High	Medium	Low	Total
Carry Forward	0	0	0	0	0
New	0	0	0	0	0
Closed	0	0	0	0	0
End of Month Balance	0	0	0	0	0

System Change Request

Category	ASAP	High	Medium	Low	Total
Carry Forward	0	0	1	0	1
New	0	0	0	1	1
Closed	0	0	1	0	1
End of Month Balance	0	0	0	1	1

Note: SIRs in POSTPONED and REJECTED status are not reflected in these numbers



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Help Desk Request Summary (CM)

Total Requests: 12

ID	STATE	TYPE OF REQ	TITLE	Priority	OPEN	CLOSED
098	Postponed	Help Desk	Create Report procedure/job aid for PAR	1. ASAP	5/23/2002	
103	Postponed	System Change Request	Exporting to Excel	4. Within 90 Days	5/23/2002	
105	Postponed	System Change Request	Ad Hoc Custom Error Message	4. Within 90 Days	5/23/2002	
132	Postponed	Data Request (Multiple)	Create Operations FMS 600 Report	3. Within 15 Business Days	6/18/2002	
133	Postponed	Help Desk	Modify CFO Accounting FMS 600 Report	3. Within 15 Business Days	6/18/2002	
275	Postponed	Data Request (1 Time)	Loans in deferment or bankruptcy	3. Within 15 Business Days	8/9/2002	
116	Rejected	Help Desk	Need to add Accounts to D_FMS_ACCT Table	1. ASAP	6/6/2002	
097	Assigned	Data Request (Multiple)	Loan Servicing Report Request -(Maria Rojzman)	3. Within 15 Business Days	5/23/2002	
378	Assigned	System Change Request	ReLoad FY03 Demographic Data for Oct & Nov	4. Within 90 Days	2/11/2003	
382	Assigned	Data Request (1 Time)	AmeriCorps Borrowers	1. ASAP	2/14/2003	
195	Ready_for_Test	Data Request (Multiple)	TROR Reports returning incorrect numbers	3. Within 15 Business Days	7/16/2002	
346	Closed	System Change Request	demographic data	3. Within 15 Business Days	12/18/2002	2/24/2003



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Help Desk Request Details (CM)

Total Requests: 12

ID: MPOps00000098 **Title:** Create Report procedure/job aid for PAR 3/4/2003 4:06:49PM
State: Postponed **Priority:** 1. ASAP
Date Opened: 5/23/2002 4:00:00A **Target Date:** 6/30/2002 4:00:00A
Requestor: Jayasri Kuppasamy, 202-9 **Assigned:** Eric Merkel, 202-962-0881

Description:

SIR #414

Create Report procedure document/job aid for Portfolio Analysis Report

Activity Log:

ID: MPOps00000103 **Title:** Exporting to Excel
State: Postponed **Priority:** 4. Within 90 Day
Date Opened: 5/23/2002 4:00:00A **Target Date:** 9/23/2002 4:00:00A
Requestor: David Marker, 202-962-06 **Assigned:** Al Bradley, 202-962-0661

Description:

SIR #203

On all reports when you export to excel numbers that begin with zeros lose the zeros. For example the SSN 003287489 will appear as 3287489 once the report is exported to Excel. After exporting if you change the excel formatting to "Special/SSN" the 0's will appear, however for something like CRC code that starts with 0's you would have to change the formatting to text and then hand enter in the missing 0's

Activity Log:

===== State: Assigned by:abradley at 6/11/02 6:54:18 PM =====

Al-

At 6/4/02 Power Users meeting it was agreed that this issue is on hold pending upgrade to MSTR 7i. 7i has Windows like formatting available on the Web.

This issues is related to normal MS Excel export functionality. This issue can be discussed in training/process documentation on MS Excel export functionality.

The procedures for the above work-around were addressed in the Basic Web User course. The procedures will also be documented in the training materials.

===== State: Opened by:dmarker at 5/23/02 2:26:15 PM =====

This issues is related to normal MS Excel export functionality. This issue can be discussed in training/process documentation on MS Excel export functionality.

The procedures for the above work-around were addressed in the Basic Web User course. The procedures will also



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be documented in the training materials.

ID: MPOps00000105 **Title:** Ad Hoc Custom Error Message
State: Postponed **Priority:** 4. Within 90 Day
Date Opened: 5/23/2002 4:00:00A **Target Date:** 7/31/2002 4:00:00A
Requestor: David Marker, 202-962-06 **Assigned:** Al Bradley, 202-962-0661

Description:

SIR #351

If the user selects a combination of attributes that are not in the same table an error message appears. This error message needs to be customized to be more user friendly

Activity Log:

===== State: Assigned by:dmarker at 5/24/02 9:57:42 AM =====

This SIR was mistakenly put as Ready for Test. It has not been worked on yet and is a low priority SIR so it will not be worked on for some time

ID: MPOps00000132 **Title:** Create Operations FMS 600 Report
State: Postponed **Priority:** 3. Within 15 Bus
Date Opened: 6/18/2002 4:00:00A **Target Date:** 7/2/2002 4:00:00AM
Requestor: Eric Merkel, 202-962-0881 **Assigned:** Eric Merkel, 202-962-0881

Description:

Copy the FMS600 reports (monthly/weekly) located under CFO Accounting folder to Operations folder and modify to allow easier use during reconciliation (ie remove transaction detail, and add IF020 summary)

Activity Log:

ID: MPOps00000133 **Title:** Modify CFO Accounting FMS 600 Report
State: Postponed **Priority:** 3. Within 15 Bus
Date Opened: 6/18/2002 4:00:00A **Target Date:** 7/2/2002 4:00:00AM
Requestor: Eric Merkel, 202-962-0881 **Assigned:** Eric Merkel, 202-962-0881

Description:

Modify the FMS 600 reports available to power users (monthly and weekly located under CFO Accounting folder) by adding IF020 transactions

Activity Log:

ID: MPOps00000275 **Title:** Loans in deferment or bankruptcy
State: Postponed **Priority:** 3. Within 15 Bus



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Date Opened: 8/9/2002 4:00:00AM
Requestor: Allen Producers, 202-377-3

Target Date:
Assigned:

Description:

The request comes from default management. For the months of 10/96 through 9/01 they want the number of loans entering (effective date):
unemployment deferment
economic hardship
and bankruptcy

They also want it broken down by type and control.

Waiting to hear from the requester. Expect a two week delay.

I've attached a sample of the format which you can use as a guide.

Activity Log:

ID	MPOps00000116	Title:	Need to add Accounts to D_FMS_ACCT Ta
State:	Rejected	Priority:	1. ASAP

Date Opened:	6/6/2002 4:00:00AM	Target Date:	6/7/2002 4:00:00AM
Requestor	David Marker, 202-962-06	Assigned:	Al Bradley, 202-962-0661

Description:

Need to add Acct_Description column to the D_TXN_MAP table, populate the column with the values from the D_FMS_ACCT table description column, then delete the D_FMS_ACCT table, and finally remove any references to the D_FMS_ACCT table from the Microstrategy reports.

Be sure to do in all environments: dev, test (CMDM and CONV), and prod.

ALSO the following three descriptions were missing in the D_FMS_ACCT table.

101052 Cash Disbursements - ALC005
101072 Cash Disbursements - ALC007
101073 Cash Collections - ALC007

Activity Log:

===== State: Ready_for_Test by:dpan at 6/6/02 3:13:14 PM =====

modifications have been made to d_txn_map in development. table definition and data need to be migrated to test.

Table definition and data have been migrated to test, ready for test.

===== State: Assigned by:emerke at 6/6/02 2:50:44 PM =====

modifications have been made to d_txn_map in development. table definition and data need to be migrated to test.



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ID: MPOps00000097 **Title:** Loan Servicing Report Request -(Maria Roj
State: Assigned **Priority:** 3. Within 15 Bus

Date Opened: 5/23/2002 4:00:00A **Target Date:** 12/12/2002 5:00:00
Requestor: Dorothy Pan, 202-962-072 **Assigned:** Al Bradley, 202-962-0661

Description:

SIR #391

Create new recurring CMDM loan servicing report as requested by Maria Rojtmán
Create a new demographic aggregate table to meet request. Confirm requirement with Russell Trujillo and Andy Cho.

Activity Log:

===== State: Assigned by:abradley at 11/21/2002 8:08:47 PM =====

11/21/02 Differences found in CMDM/MIS loan count aggregations by Cohort Year. Reasearching cause by looking into Cohort Year 1994.

Per Maria she would like to use the interest only method used by MIS. Per Jay, the change should be CMDM wide.

11/14/02 Identified differences in MIS and CMDM interest only calculations. Waiting for response from Maria Rojtmán on preferred method.

Created CMDM aggregation from Aug.2002 F_LOAN. Total loan count and dollars matched MIS loans file. Need to validate CMDM aggregations by report attributes to MIS. MIS report to be prepared by October 14th.

Dorothy, plase migrate data for the following lookup tables from Dev to Test/CMDM schema.

D_LOAN_STATUS_CTG_HEA
D_LOAN_STATUS_HEA
D_REPAYMENT_PLAN_HEA
D_SCHOOL_SECTOR

To meet this requirement. 2 new aggregations and 4 new lookups were created.

A_DEMOG_DLREPAY_BORR
A_DEMOG_DL_REPAY_LOAN
D_LOAN_STATUS_CTG_HEA
D_LOAN_STATUS_HEA
D_REPAYMENT_PLAN_HEA
D_SCHOOL_SECTOR

Migrated above table structure to CMTST.

DATA has been migrated for the following tables on CMTST from SCMDEV.

D_LOAN_STATUS_CTG_HEA
D_LOAN_STATUS_HEA
D_REPAYMENT_PLAN_HEA
D_SCHOOL_SECTOR



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===== State: Assigned by:abradley at 11/18/2002 4:31:13 PM =====

11/14/02 Identified differences in MIS and CMDM interest only calculations. Waiting for response from Maria Rojzman on preferred method.

Created CMDM aggregation from Aug.2002 F_LOAN. Total loan count and dollars matched MIS loans file. Need to validate CMDM aggregations by report attributes to MIS. MIS report to be prepared by October 14th.

Dorothy, please migrate data for the following lookup tables from Dev to Test/CMDM schema.

D_LOAN_STATUS_CTG_HEA
D_LOAN_STATUS_HEA
D_REPAYMENT_PLAN_HEA
D_SCHOOL_SECTOR

To meet this requirement. 2 new aggregations and 4 new lookups were created.

A_DEMOG_DLREPAY_BORR
A_DEMOG_DL_REPAY_LOAN
D_LOAN_STATUS_CTG_HEA
D_LOAN_STATUS_HEA
D_REPAYMENT_PLAN_HEA
D_SCHOOL_SECTOR

Migrated above table structure to CMTST.

DATA has been migrated for the following tables on CMTST from SCMDEV.

D_LOAN_STATUS_CTG_HEA
D_LOAN_STATUS_HEA
D_REPAYMENT_PLAN_HEA
D_SCHOOL_SECTOR

===== State: Assigned by:abradley at 10/7/02 11:09:48 AM =====

Created CMDM aggregation from Aug.2002 F_LOAN. Total loan count and dollars matched MIS loans file. Need to validate CMDM aggregations by report attributes to MIS. MIS report to be prepared by October 14th.

Dorothy, please migrate data for the following lookup tables from Dev to Test/CMDM schema.

D_LOAN_STATUS_CTG_HEA
D_LOAN_STATUS_HEA
D_REPAYMENT_PLAN_HEA
D_SCHOOL_SECTOR

To meet this requirement. 2 new aggregations and 4 new lookups were created.

A_DEMOG_DLREPAY_BORR
A_DEMOG_DL_REPAY_LOAN
D_LOAN_STATUS_CTG_HEA
D_LOAN_STATUS_HEA



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D_REPAYMENT_PLAN_HEA
D_SCHOOL_SECTOR

Migrated above table structure to CMTST.

DATA has been migrated for the following tables on CMTST from SCMDEV.

D_LOAN_STATUS_CTG_HEA
D_LOAN_STATUS_HEA
D_REPAYMENT_PLAN_HEA
D_SCHOOL_SECTOR

===== State: Ready_for_Migration by:dpan at 6/13/02 4:30:40 PM =====

Dorothy, please migrate data for the following lookup tables from Dev to Test/CMDM schema.

D_LOAN_STATUS_CTG_HEA
D_LOAN_STATUS_HEA
D_REPAYMENT_PLAN_HEA
D_SCHOOL_SECTOR

To meet this requirement, 2 new aggregations and 4 new lookups were created.

A_DEMOG_DLREPAY_BORR
A_DEMOG_DL_REPAY_LOAN
D_LOAN_STATUS_CTG_HEA
D_LOAN_STATUS_HEA
D_REPAYMENT_PLAN_HEA
D_SCHOOL_SECTOR

Migrated above table structure to CMTST.

DATA has been migrated for the following tables on CMTST from SCMDEV.

D_LOAN_STATUS_CTG_HEA
D_LOAN_STATUS_HEA
D_REPAYMENT_PLAN_HEA
D_SCHOOL_SECTOR

===== State: Ready_for_Migration by:abradley at 6/13/02 3:45:04 PM =====

Dorothy, please migrate data for the following lookup tables from Dev to Test/CMDM schema.

D_LOAN_STATUS_CTG_HEA
D_LOAN_STATUS_HEA
D_REPAYMENT_PLAN_HEA
D_SCHOOL_SECTOR

To meet this requirement, 2 new aggregations and 4 new lookups were created.

A_DEMOG_DLREPAY_BORR
A_DEMOG_DL_REPAY_LOAN



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D_LOAN_STATUS_CTG_HEA
D_LOAN_STATUS_HEA
D_REPAYMENT_PLAN_HEA
D_SCHOOL_SECTOR

Migrated above table structure to CMTST.

===== State: Ready_for_Migration by:dpan at 6/12/02 5:42:30 PM =====

To meet this requirement. 2 new aggregations and 4 new lookups were created.

A_DEMOG_DLREPAY_BORR
A_DEMOG_DL_REPAY_LOAN
D_LOAN_STATUS_CTG_HEA
D_LOAN_STATUS_HEA
D_REPAYMENT_PLAN_HEA
D_SCHOOL_SECTOR

Migrated above table structure to CMTST.

===== State: Assigned by:abradley at 6/12/02 4:26:46 PM =====

To meet this requirement. 2 new aggregations and 4 new lookups were created.

A_DEMOG_DLREPAY_BORR
A_DEMOG_DL_REPAY_LOAN
D_LOAN_STATUS_CTG_HEA
D_LOAN_STATUS_HEA
D_REPAYMENT_PLAN_HEA
D_SCHOOL_SECTOR

ID	MPOps00000378	Title:	ReLoad FY03 Demographic Data for Oct &
State:	Assigned	Priority:	4. Within 90 Day

Date Opened:	2/11/2003 5:00:00A	Target Date:	3/14/2003 5:00:00A
Requestor	Andy Cho, 202-377-3493	Assigned:	Mark Mandrella, 202-962-0721

Description:

The f_loan and a_demog_month_1 will be reloaded to reflect the updated cohort year mappings. The plan is to use the new cohort year mapping for all of FY03. December reload has been completed. Oct & Nov will be done as part of the aggregations ongoing in the test environment.

Al to run script to add cf20 records into a_demog_month_borr for Oct & Nov when the f_loans are restored.

2/24/02: Al to run PBO > 100k query for October.

Activity Log:

ID	MPOps00000382	Title:	AmeriCorps Borrowers
State:	Assigned	Priority:	1. ASAP



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Date Opened: 2/14/2003 5:00:00A
Requestor Russell Trujillo, 202-377-

Target Date:
Assigned: Jay Main, 301-212-8061

Description:
See Attachment.

Activity Log:

ID MPOps00000195 **Title:** TROR Reports returning incorrect numbers
State: Ready_for_Test **Priority:** 3. Within 15 Bus

Date Opened: 7/16/2002 4:00:00A **Target Date:** 2/23/2003 5:00:00A
Requestor Eric Merkel, 202-962-0881 **Assigned:** Al Bradley, 202-962-0661

Description:
TROR reports (IA - Dollars, IA - Numbers) returning incorrect results when comparing subsequent quarters

Activity Log:

===== State: Ready_for_Test by:abradley at 2/11/2003 9:47:34 AM =====

2/11/03 A Bradley: Changed IA Numbers Report to correct beginning balance and to remove year prompt. Report can now function with a single prompt on quarter. CR will be submitted on 2/11, anticipate move to Prod on 2/23.

Dollar report corrected (metrics not set to outer join on report)

===== State: Assigned by:emerkel at 7/16/02 12:01:34 PM =====

Dollar report corrected (metrics not set to outer join on report)

ID MPOps00000346 **Title:** demographic data
State: Closed **Priority:** 3. Within 15 Bus

Date Opened: 12/18/2002 5:00:00 **Target Date:** 1/28/2002 5:00:00A
Requestor Andy Cho, 202-377-3493 **Assigned:** Al Bradley, 202-962-0661

Description:
Please migrate demographic data (May, June, July, August, Sept 02) on tapes to Test environment. We have run reports against these previous months.

Activity Log:

===== State: Ready_for_Test by:abradley at 2/11/2003 9:44:14 AM =====

Al Bradley 2/11/03 - November also executed and sent to A. Cho on 2/10. Per 2/11 Power User meeting SIR can be closed.

Al Bradley 1/28/03 - Aug and Sept complete. Pending A. Cho approval, SIR can be closed.

Al Bradley 1/27/03- May, June and July query results sent to A. Cho 1/24. Aug. is in process. Waiting for September to be restored to the Test environ.



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Al Bradley - Per M. Mandrella, the files exist on the development server. As each month is restored, I can kick off the desired queries for that month. I will confirm the data elements of this request with Andy.

===== State: Assigned by:abradley at 1/28/2003 11:57:51 AM =====

Al Bradley 1/28/03 - Aug and Sept complete. Pending A. Cho approval, SIR can be closed.

Al Bradley 1/27/03- May, June and July query results sent to A. Cho 1/24. Aug. is in process. Waiting for September to be restored to the Test environ.

Al Bradley - Per M. Mandrella, the files exist on the development server. As each month is restored, I can kick off the desired queries for that month. I will confirm the data elements of this request with Andy.

===== State: Assigned by:abradley at 1/27/2003 10:51:22 AM =====

Al Bradley 1/27/03- May, June and July query results sent to A. Cho 1/24. Aug. is in process. Waiting for September to be restored to the Test environ.

Al Bradley - Per M. Mandrella, the files exist on the development server. As each month is restored, I can kick off the desired queries for that month. I will confirm the data elements of this request with Andy.

===== State: Assigned by:abradley at 1/7/2003 1:41:32 PM =====

Al Bradley - Per M. Mandrella, the files exist on the development server. As each month is restored, I can kick off the desired queries for that month. I will confirm the data elements of this request with Andy.